
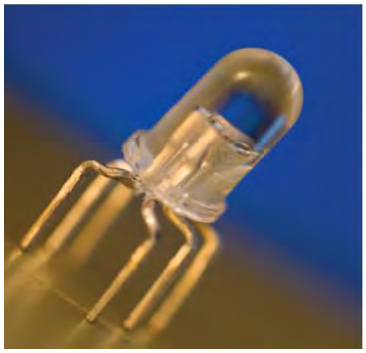


Assessment of climate change policies as part of the European Semester

Country Report Slovenia

21 January 2015

A report submitted by ICF Consulting Services
in association with

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Contents

1 Short Summary

In Slovenia a number of strategic documents govern the country's climate and energy targets, of which the National Operational Programme to reduce GHG emissions by 2020 (OP GHG 2020), adopted by the Government on 17 December 2014 is the most important in terms of GHG emission reduction. Slovenia's target according to the operational programme for 2020 is not to increase GHG emissions by more than 4% compared to 2005.

By 2020, Slovenia can increase its emissions not covered by the EU ETS by 4% compared to 2005, according to the Effort Sharing Decision (ESD). However, the latest data for 2013 show that Slovenia emitted 9.5 percentage points less than it was allowed to under the annual allocation interim target under the ESD for the year 2013. National projections indicate that the country may just miss its 2020 target by about 0.1 percentage points with existing measures but will meet and significantly exceed the target with additional measures.

The key policy developments in the last year (Jan. 2014 – Jan. 2015) include the adoption of the new core energy legislation – the Energy Act (EZ-1) adopted in March 2014. The 2014 Energy Act provides a legal basis for the adoption of national strategic documents that will determine the long-term trend in energy supply and use. Following the adoption of the Act, Slovenia will develop an Energy Concept (to be adopted in 2015), and a National Energy Development Plan, which will guide major investments in energy infrastructure in the future and help with the creation of local energy concepts. Furthermore, a draft on the Action Plan on nearly-Zero Emission Buildings was published in late October 2014, following the line of sectorial Action Plans in place in Slovenia as well as an updated Action Plan on Energy Efficiency, which was open for public discussion in August 2014 and is currently in inter-ministerial consultation.

2 Climate and energy policy priorities

Slovenia has a number of sector specific goals for greenhouse gas (GHG) emission reductions projected for 2020 and 2050. These largely follow the EU guidelines but also keep in mind the country specific situation (see Table 1 below). The specific sectors are each targeted by at least one strategic document of which the Operational Programme to reduce GHG emissions by 2020 (OP GHG 2020) is the main coordinating document. The OP GHG 2020 foresees Slovenia achieving its goals with already existing measures (WEM) while it also supports the implementation of additional measures (WAM) in accordance with the regional development and global progressions. In 2015 the adoption of two important strategic documents is planned - the Energy Concept of Slovenia and a National Energy Development Plan, both of which will guide major investments in energy infrastructure and further planning in climate policies. In 2014 two other important strategic documents were proposed. First is the Action Plan on Nearly-Zero Buildings published in August 2014 and opened for public discussion. The second is an updated Action Plan for Energy Efficiency for the period 2014 - 2020 (AN URE 2020) – published in August 2014 and currently in inter-ministerial coordination (November 2014). With these documents Slovenia plans to reach its national goals as well as agreed international obligations.

Table 1 Indicative sectorial targets to reduce GHG emissions

	Annual allowed emissions in 2005 kt CO_2eq	**Indicative goals compared to 2005 emission levels**	
		2020	**2050**
Transport	4.431	+ 27 %	+ 18 %
Wide use	2.585	- 53 %	- 66 %
Agriculture	2.003	+5 %	+ 6 %
Waste	692	- 44 %	- 57 %
Industry	1.511	- 42 %	- 32 %
Energy sector	365	+ 6 %	- 16 %

In Slovenia, the structure of total primary energy consumption is still dominated by liquid fuels (mineral oils) with a share of 35% (largely due to the transport sector), followed by 21 % of nuclear power (a share of around 40% in electricity generation) and a 20 % share of solid energy sources (coal and lignite), the share of renewable energy sources (RES) accounted for 15% while 10% was natural gas (ARSO 2013; the latest data are for the year 2012). The aforementioned Energy Concept of Slovenia and the National Energy Development plan will provide a long-term strategy for the Slovenian energy policy planning as well as planning of the structure of primary energy consumption. The principle of an environmentally friendly, reliable, and affordable energy supply is the main objective. The Action Plans on Energy Efficiency and the Action Plan on Renewable Energy Sources both set targets for the 2020 share of renewable energies in electricity (39.3%), heat and transport (30.8 %), as well as for the reduction of primary energy demand, energy end-use efficiency improvements, electricity generated from cogeneration and for the reduction of electricity consumption, energy consumption in buildings and transport.

As regards recent developments in the energy and climate sector the new Government in term has agreed to propose a referendum on the future of nuclear energy in Slovenia as the construction of a second block of the nuclear power plant in Krško is currently being heavily debated. Furthermore the construction of the 6th Block of the Coal power plant in Šoštanj (TEŠ 6) is proceeding as planned as well as the planned chain of hydro-power plants in the lower and middle Sava river.

3 GHG trends and projections

Slovenia reduced its total GHG emissions by 10% between 2005 and 2013. The share of GHG emissions not covered by the European Emission Trading Scheme (EU ETS) is around 59%, which is close to the EU28 average (see Table 2).[1]

Table 2 Key data on GHG emissions

		National data				*EU28*
		2005	**2011**	**2012**	**2013**	***2013***
Total GHG emissions	Mt CO_2eq	20.3	19.5	18.9	18.2	*4 539*
Non-ETS emissions	Share in total emissions	57%	59%	60%	59%	*58%*

Source: EEA 2014a; EEA 2014c

By 2020, Slovenia can increase its emissions not covered by the EU ETS by 4% compared to 2005, according to the Effort Sharing Decision (ESD). However, the latest data for 2013 show that Slovenia emitted 9.5 percentage points less than it was allowed under the annual allocation interim target under the ESD for the year 2013 (see figures in Table 3). National projections indicate that the country may just about miss its 2020 target by about 0.1 percentage points with existing measures (WEM) but will meet and significantly exceed the target with additional measures (WAM) (EEA 2014a).

Table 3 Non-ETS emission targets, trend and projections

		Compared to base year
2013	ESD interim target	+ 2.3%
	ESD emissions	- 7.2%

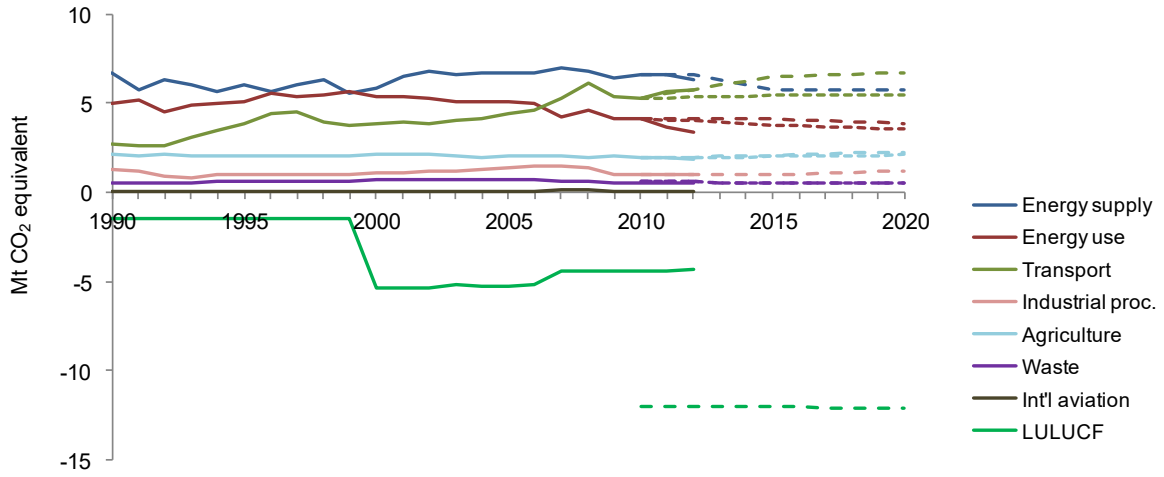
[1] The European Environment Agency has developed a complex methodology to measure progress on the Non-ETS/ESD targets of all EU Member States. This report uses the figures derived on this basis. A detailed explanation and the underlying absolute amounts are contained in Annexes 1-3 of the EEA report No 6/2014 "Trends and projections in Europe 2014. Tracking progress towards Europe's climate and energy targets for 2020" available at http://www.eea.europa.eu/publications/trends-and-projections-in-europe-2014/

2020	ESD target	+ 4.0%
	ESD projections WEM	+ 4.1%
	ESD projections WAM	- 10.7%

Source: EEA 2014a. Green indicates target met or exceeded, orange indicates a value below.

GHG emissions are mainly created by the energy industry followed by the transport sector and direct fuel consumption (e.g. households for heat generation) (see Figure 1 below for historic and estimated emissions by sector). Projections indicate that by 2020 emissions in the energy industry will with existing measures decrease, increase in the transport sector and remain stable in direct fuel consumption. Additional measures would prevent the rise in emissions from transport and bring additional reductions from energy use. Significant additional reductions in the form of sink capacity are projected in Land Use, Land Use Change and Forestry (LULUCF).

Figure 1 GHG trends and projections by sector



Source: EEA 2014a. Actual data until 2012 and projections from 2010 onwards. Dashed lines indicate the WEM projection, dotted lines the WAM projection.

4 Policy development

This section covers significant developments made in key policy areas between January and December 2014. It does so through two different perspectives: 1) progress on the policies communicated under the National Reform Programme 2) developments in the identified national priority sectors and policy areas.

4.1 Key policies as outlined in the National Reform Programme

Member States prepare National Reform Programmes (NRPs) each April outlining the country's progress and the key policies and measures to achieve targets under the EU 2020 Strategy. These key policies and measures are summarised in the following table and their current status is provided.

Table 4 Key policies and measures as outlined by the NRP 2014

Drafting of National Action Plan for Reducing Greenhouse Gas Emissions 2013+	
Status in the NRP	Measures under the National Action Plan for Reducing Greenhouse Gas Emissions by 2020 are being drafted.
Status as per Dec 2014	The Government adopted the Action Plan on 17 December 2014.
Description of policy	See Chapter 4.2.

National Energy Efficiency Action Plan for 2013+	
Status in the NRP	In 2014 a new National Action Plan will be drawn up.
Status as per Dec 2014	The Draft document was presented in late August, with a public debate open until November. The document is now in inter-ministerial coordination.
Description of policy	The Energy Efficiency National Action Plan will define measures to achieve a 20% increase in energy efficiency by 2020, much like the NREAP and its predecessor Action Plan for 2008-2016.

Energy performance certificates	
Status in the NRP	An electronic registry of certificates issues will be established.
Status as per Dec 2014	The registry is now in place and the new Rules on the methodology and the granting of certificates for buildings was adopted in late December 2014.
Description of policy	Slovenia introduced a new obligation of energy certificates for buildings in 2014. The Registry and Rules are an integral part of this scheme.

4.2 National policy priorities

The below sub-sections provide updates on key existing and new policies in priority sectors and policy areas of relevance to the energy and climate targets under the Europe 2020 strategy[2]. Each sector or policy area contains information on the most important policy instruments in operation or development.

4.2.1 Environmental Taxation

In Slovenia, the implicit tax rate on energy is close to the EU average with EUR 172 per ton of oil equivalent in 2012 (Eurostat, tsdcc360). However, the share of environmental tax revenues in overall tax revenue was at 10.2% in 2012, which is the highest in the EU (compared to an average of 6.1%) (Eurostat, ten00064). Similarly, when comparing environmental tax revenues with GDP, Slovenia has the second highest share in the EU at 3.8% in 2012 (with the average at 2.4%) (Eurostat, ten00065).

The developments in this area in 2014 include a proposal by the Government to phase out inefficient subsidies, revise environmental taxes in the field of environmental protection, promote efficiency of vehicles in the context of tax on motor vehicle and re-evaluate excise taxes on transport fuels (OP GHG 2020). Furthermore the Government has increased the price per unit of pollution of the environment from 1.44 € cents to 1.73 € cents per unit (the latter is used in many environment pollution fees as part of the equation for the respective environment burden fee) (Government of the republic of Slovenia, December 2014).

[2] The Consortium jointly with DG Clima identified these based on identified challenges in Country Profiles (EEA, 2014), share of sectors in total GHG emissions, and Country Specific Recommendations (2014). DG Clima has identified additional relevant issues to be reviewed for some or all Member States, including country specific energy challenges.

4.2.2 Energy Efficiency

Compared to the EU-28, Slovenia has the tenth most-energy-intensive economy. Energy intensity declined by 11% between 2005 and 2012 (Eurostat, tsdec360), while the final energy consumption dropped by only 1% between 2005 and 2012 with the reductions coming mainly from the industrial sector, but being absorbed by increases in the transport sector (Eurostat, tsdpc320). However, Slovenia has EU energy efficiency targets that allow for a limited increase in primary and final energy consumption over historic levels and with the reductions achieved it is currently on track towards meeting those targets (EEA, 2014a).

The interim targets of the National Action Plan for Energy Efficiency (AN URE 1) of reaching 9% of final energy savings will be met for the year 2015. In the first commitment period of the year 2008 - 2010 Slovenia reached 2.8% of final energy savings, exceeding the interim target of 2.5%. In 2012 the savings were 15% higher than the projected goal. These figures are mostly due to early activities in the period from 1995 to 2007 that were taken into account (Ministry of Infrastructure, August 2014; AN URE 2).

The key measure adopted in the field of energy efficiency in 2014 is the introduction of an updated National Action Plan for Energy Efficiency (AN URE 2), as foreseen in the NRP. A draft document was published in late August and is currently in inter-ministerial coordination (November 2014).

One of the most important sectors in terms of energy efficiency in Slovenia is the building sector. The objective here is to ensure that all new buildings, owned and used by public authorities, will be zero-energy from 2018 onwards and in other building sectors from 2020 onwards. This goal was also included in the provisions of the new energy act (EZ-1). The interim national goals and national measures for increasing the number of zero-energy buildings are laid down in the Action Plan for Nearly-Zero Energy Buildings, published and open for public consultation since late October 2014 (the action plan is to be adopted by mid 2015). While the Action Plan merely provides goals, definitions of a nearly-zero building, requirements and interim targets for this sector a National Strategy for renovation of buildings is being drafted (expected to be published in September 2015) and will most likely upgrade the current financial incentive scheme of the Eco Fund. It is expected that with this measure the use of energy in buildings will decrease by 53 % by 2020 compared to the year 2005, for which 16.8 Million m^2 of building space will need to be refurbished. In addition, these measures will also accelerate economic growth, since the investment yield is calculated to about 500 million EUR per year as well as generating approximately 10,000 jobs (Ministry of Infrastructure, 2014; OP GHG 2020).

Among the most controversial changes in 2014 in the field of energy efficiency was the introduction of energy certificates for building owners through the new Energy Act (EZ-1). Many stakeholders (especially landlords) were against the introduction of the certification scheme who argued that it would only incur costs without achieving real results. However the Ministry of Infrastructure claim that it will provide further incentives to improve energy efficiency and increase the rate of building energy refurbishments. The Ministry for Infrastructure issued Rules on the methodology and the granting of certificates for buildings in late December 2014.

4.2.3 Renewable Energy

The share of renewables in gross final energy consumption was 20.2% in 2012 which is above the indicative 2012 target of 17.8% set out by the Renewable Energy Directive (RED). The average annual growth rate was 3.5% between 2005 and 2012. Thus, an annual growth rate of 3.3% is still needed between 2013 and 2020 to reach the 2020 target of 25% (EEA, 2014a). The share of renewable electricity generation in final electricity consumption increased slightly from 28.7% to 31.4% between 2005 and 2012, while the share of renewable heating increased by more than half from 18.9% to 30.6% (Eurostat, SHARES, 2014).

The latest data for 2013 show a positive trend in the share of renewable energy sources (RES) in gross final energy consumption in Slovenia in 2013. Compared to the previous year it increased by 1.3% and was 5.5% higher than in 2005, reaching an overall share of 21.5%. The target for 2020 is 25% RES in gross final energy consumption, meaning that in the next 7 years an annual increase of 0.5% will be needed to achieve the goal. Most RES were used in 2013 for the production of heating

and cooling (RES H&C) (56%), followed by the production of electricity (RES-E) (38%) and transport (RES-T) (5%) (ARSO, 2014a; SURS, 2014).

In the gross final energy consumption the heating and cooling had a share of 32.8% in 2013, which is 1.5% points higher than in the previous year. The increase is primarily due to the replacement of fuels in households. The RES H&C share in recent years has increased rapidly. The share of energy from RES-E in 2013 amounted to 32.8%, which is a decline compared to previous years where the share has already preceded the 2020 goal of 39.3% but is mostly due to the fact that 92% of the generated renewable electricity comes from hydropower, which is subject to high fluctuations. The overall installed capacity of hydro power plants has increased by 25% in the past decade and is still increasing with the construction of hydro power plants on the lower and middle Sava River continuing in 2014. The share of RES-T was at 3.4%, which is 0.5 percentage points higher than in 2012. The increase is due to higher consumption of biofuels and lower overall use of fuels (ARSO, 2014b; SURS, 2014).

Among the measures for the promotion of electricity produced from RES, the most important is the feed-in tariff, which has been revised times: in 2009, 2012 and, most recently, in 2014. The system is governed by the Regulation on support for electricity produced from renewable energy sources and the Energy Act. The 2014 revision by the Energy Act (EZ-1) introduced a new mechanism for RES-E support. Only those technologies who have the best economic/environment saving ratio and are limited with an annual support cap are granted support (via a public tender). In 2014 the Slovenian Energy Agency, who is responsible to prepare the tender according to the provisions of the Energy Act (EZ-1), informed all potential investors that there will be no tender for 2015 due to insufficient funds. All in all the year 2014 saw a rather small number of new entrants into the RES-E support scheme (until September 22 the provisions of the old legislation were still in place). Around 180 new installations entered the support scheme with a total power output of approx. 18 MW. Investments in new capacity are also promoted by the Eco Fund through favourable loans and financial incentives. Large hydro systems are not included (Keep on Track, Year 3 Report).

The newly adopted Energy Act (EZ-1) also brought with it an obligation to heat providers to ensure that RES generate a certain share of the heat provided. The new Action Plans on Energy Efficiency and the existing Renewable Energy Actions Plan envisage further promotion of these efforts (especially those targeting the use of wood biomass).

4.2.4 Transport

Both GHG emissions and energy consumption from transport more than doubled between 1990 and 2012. Similarly, the proportion of transport emissions among Slovenia's total emissions increased to 30% (Eurostat, tsdcc210 and tsdpc320). In 2009 and 2010 emissions from the transport sector fell sharply due to the economic crisis however in the following years emissions have increased again. Average emissions for newly registered cars are moderate in Slovenia with a level of 125.6 CO_2/km. The level is the eleventh lowest in the EU but has decreased by 20%, a slightly slower rate than the EU average of 22% between 2005 and 2012 (Eurostat, tsdtr450). Fuel taxation in Slovenia is above EU average.

The road fuel excise duties on diesel are the seventh highest among EU MS, while the excise duties on petrol are the thirteenth highest (EEA 2014b). While Slovenia levies a registration tax which is based on purchase price, CO_2 emissions, and engine fuel, no ownership tax applies. However, Slovenia charges a small, annual environmental pollution tax, a time-based national vignette system for passenger cars and light trucks, and a distance-based toll for HDVs (ACEA 2014, CE Delft 2012).

The transport sector therefore represents the most problematic sector in the in Slovenia. The above indicated increase is mainly due to an increase in the number of registered vehicles, mileage and speed, a reduced share of public transport and traffic on railways. The predominant share of emissions in the transport sector comes from road traffic (97%). A very important factor is the transit transport which has become especially evident in the years following Slovenia's accession to the EU. Transit traffic is however not the only "culprit" for higher emissions, as Slovenia did not implement measures that were listed in the Operational Program to reduce greenhouse gas emissions (OP GHG 2008-2012) (Ministry of Agriculture and the Environment, 2012) (explained below).

Slovenia's Government seeks to promote public transportation and make private vehicle usage less attractive. The Government allocated 8 million EUR for "Park and Ride" schemes from the EU Cohesion Fund in 2014. Moreover, public transport subsidies are available for students and efforts were undertaken to synchronise public transport and establish public transport zones. Some city centres (e.g. the capital city of Ljubljana and the two major cities of Maribor and Celje) have also been closed to car traffic and new public bus lines are being implemented. In addition, the Government has recently increased investment in railway lines (Ministry of Infrastructure; 2014).

The abolished Government Office for Climate Change wrote in its last report for the year 2011 that among the policies defined in the first Operational Plan for GHG emission reduction (dated to the year 2004) the most unsuccessful were the measures in the transport sector. In the drafting of the newly published Action Plan to Reduce Greenhouse Gas Emissions by 2020 (OP GHG 2020), an analysis was made of the implementation of the measures of the previous operational program (OP GHG 2008-2012) for the year 2012. The report included a financial analysis of the measures and has shown that some measures were lacking proper funding and that this was the main reason why the efforts failed.

The new OP GHG 2020 focuses on four main measures in the transport sector: the promotion and competitiveness of public transport; the promotion of sustainable freight transport, the increase of energy efficiency of motor vehicles and the construction of bicycle lanes and support facilities with an accompanying promotion of cycling.

The OP GHG 2020 anticipates that the average emissions of passenger cars per driven km will be 12% lower in 2020 than in 2012 – an important contribution coming from the increased use of biofuels as well as bio methane. The goal is also to increase passenger-kilometres of public transport in the period 2012-2020 by 28%. By 2020 a noticeable contribution to reducing GHG emissions will be through the introduction of new technologies, the proportion of electric vehicles and hybrids is estimated to increase by 4% by 2020. The estimated value of public funds necessary to carry out the measures is estimated at 76 million EUR. Sources of funding include: the national climate fund, EIB funds and the Cohesion Fund for the financial period 2014-2020. This figure does not include funds for the development of the railway infrastructure. The latter is mostly centred on the project of the second rail between Koper and Divača (a key transport hub for the Port of Koper and an important transport corridor for Central Europe). The project has been in discussion for almost 20 years now and is roughly estimated at 1.5 billion EUR. The current Minister for Infrastructure started a hefty debate as he stated in his presentation in September 2014 that he does not see the second rail as a "priority project" (OP GHG 2020; RTVSLO, September 2014).

The use of RES in Transport is mainly promoted through a quota obligation, which prescribes yearly quotas that fuel suppliers need to achieve. The excise duty tax relief on biofuels was abolished in April 2014 in course of the Government austerity efforts (RES Legal Europe 2014).

5 Policy progress against Country Specific Recommendations (CSRs) issued 2013

The EU Commission provides Country Specific Recommendations (CSRs) for each MS for consideration and endorsement by the European Council. The recommendations are designed to address the major challenges in relation to the targets of the EU 2020 Strategy.

No CSRs have been issued in the climate and energy area.

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